



Intellitec Solutions

Making Sense of XRM: is it Right for your Business?

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Just when you thought you had your arms around CRM, along comes....XRM.

Over the past 10 years or so, companies have embraced Customer Relationship Management software as the best tool to manage sales, service and marketing. With solutions like Microsoft Dynamics CRM, companies now track their interactions with clients and leads, identify new business opportunities, manage client support issues – and much more. These days, most organizations recognize the value of developing customer-centric systems, and software solutions like Dynamics have greatly increased CRM's adoption.

Now, XRM - a greatly enhanced version of CRM - is all the buzz. Understanding what XRM is, and its potential for your company, is the focus of this article. If you're thinking, "We don't have a sales team, we don't need a CRM product," this information is especially relevant for you. We'll lay out three examples of how XRM has successfully solved:

- An accounting firm's challenge of tracking tax returns through its workflow
- A government agency's headaches keeping on top of vendor licenses and credit standings
- A non-profit's disorganized donor outreach.

What is XRM?

Think of it as the natural evolution of CRM, only in this case the "X" stands for "anything." XRM is the concept of using the Microsoft Dynamics CRM platform to build business applications that manage things other than customers. Put another way:

- Where CRM supports sales, marketing and customer service teams, XRM can support any team in your organization.
- Where CRM automates marketing, sales and service processes, XRM automates any relevant business process or relationship
- Where CRM tracks interactions, activities, or tasks, XRM does the same – for whatever "X" is.

XRM Sharpens Your Competitive Edge

Companies that respond to market pressures and opportunities quickly gain a competitive advantage. That's why a technology framework that provides rapid development of new technology tools is so important. And that's the beauty of XRM.

XRM is a flexible development platform that leverages the Microsoft Dynamics framework to accomplish what would normally take highly skilled IT developers far more time, money and resources. Because Microsoft Dynamics CRM sits on the .NET platform, it offers outstanding out-of-the-box functionality and a huge assortment of Microsoft applications that can be repurposed to manage other relationships (there's that "X" again).

With pre-built functionality, rapid customizations, and dynamic services, XRM can accelerate application development and enhance your organization's competitive readiness.

- **Functionality:** XRM includes core application capabilities out of the box: data management, workflow, user experience, access and security, analytics and reporting are all included. No need to reinvent the wheel.
- **Customization:** Fundamental application configuration is done through a visual user interface, so non-technical resources can create and configure applications quickly. More sophisticated customizations can be addressed via standard development technologies.

I Thought You Looked Familiar!

For many business people, Microsoft Office and Outlook are central to the workday. Microsoft CRM looks and functions like a natural extension to Microsoft Office and Outlook. In fact, many users will find it difficult to tell where Microsoft Outlook leaves off and Microsoft CRM begins. With the same look and feel as Outlook, it automatically synchronizes calendar items, contacts, tasks, and e-mail. The level of CRM functionality that is viewable is based on the role of the user and you can share as much information across roles as you choose.

What Can XRM do for Your Company?

The best way to demonstrate XRM's potential is through examples. Consider these three scenarios drawn from client files; although company names are withheld due to privacy issues, each example is real and shows XRM's versatility.

Scenario 1: Track Documents and Productivity

Challenge: An accounting firm had difficulty keeping track of tax returns as the paperwork progressed through the work flow. A return would be dropped off, and the documents would be worked on by various accountants depending on the nature of the return and an individual's availability. There were written procedures detailing steps to be taken, by whom, and how each step in the process should be performed. But there was no ability to track the efficiency of the overall process or the individual tax preparers. Worse, when a client called, there was no way to quickly locate a return or determine how far along in the process it was; employees would have to manually rummage through files or ask around to find out who was currently working on it.

XRM Solution: A customized Microsoft CRM solution enabled the firm to set up an automated tax return tracking system. At each step in the preparation process, returns could be checked in and time-stamped. This allowed managers to analyze the whole process, and fine-tune where needed to increase efficiency. It also provided clear views into the productivity of individual accountants.

Scenario 2: Improve Compliance

Challenge: A government agency needed a single platform to track numerous activities related to its mission, activities that were running on disparate systems. For instance, there was no system-wide alert when a vendor's required license was about to expire. Nor was there any mechanism to alert departments of potential collection issues.

XRM Solution: The agency created system-wide alerts by customizing Microsoft CRM's automated workflows so notifications could be sent to the proper individuals – for example, notification that a vendor license was about to expire, or that a insufficient funds issue had arisen. In the latter case, Microsoft CRM went a step beyond issuing a simple alert and initiated letters, assigned tasks to

individuals, and sent e-mail reminders to facilitate the collection process. The integration with Microsoft Office enabled mail merge of Word documents, so compliance letters could be sent automatically to the appropriate people and agencies, and reports could automatically be generated in Excel for analysis.

Scenario 3: Streamline Donor Communications

Challenge: A non-profit organization needed to track services performed by contractors on behalf of its social service clients, and tie that into the system that managed its facilities as well as the donor management system.

XRM Solution: A customized Microsoft CRM solution allowed all data relevant to the non-profit's operation to be stored in one location, and made the data easily accessible. This made it much easier and more efficient to solicit large corporate donors.

Is XRM in Your Future?

As our scenarios demonstrate, XRM can be a highly versatile tool for managing any business task that requires tracking. It doesn't matter if you don't have a CRM solution in place, or even if your company doesn't use typical sales and marketing hierarchy. XRM can be configured to conform to your needs, and has much to offer. With so much functionality built in, and familiar user interfaces, an XRM solution built on Microsoft Dynamics CRM is a pragmatic, and efficient, solution.